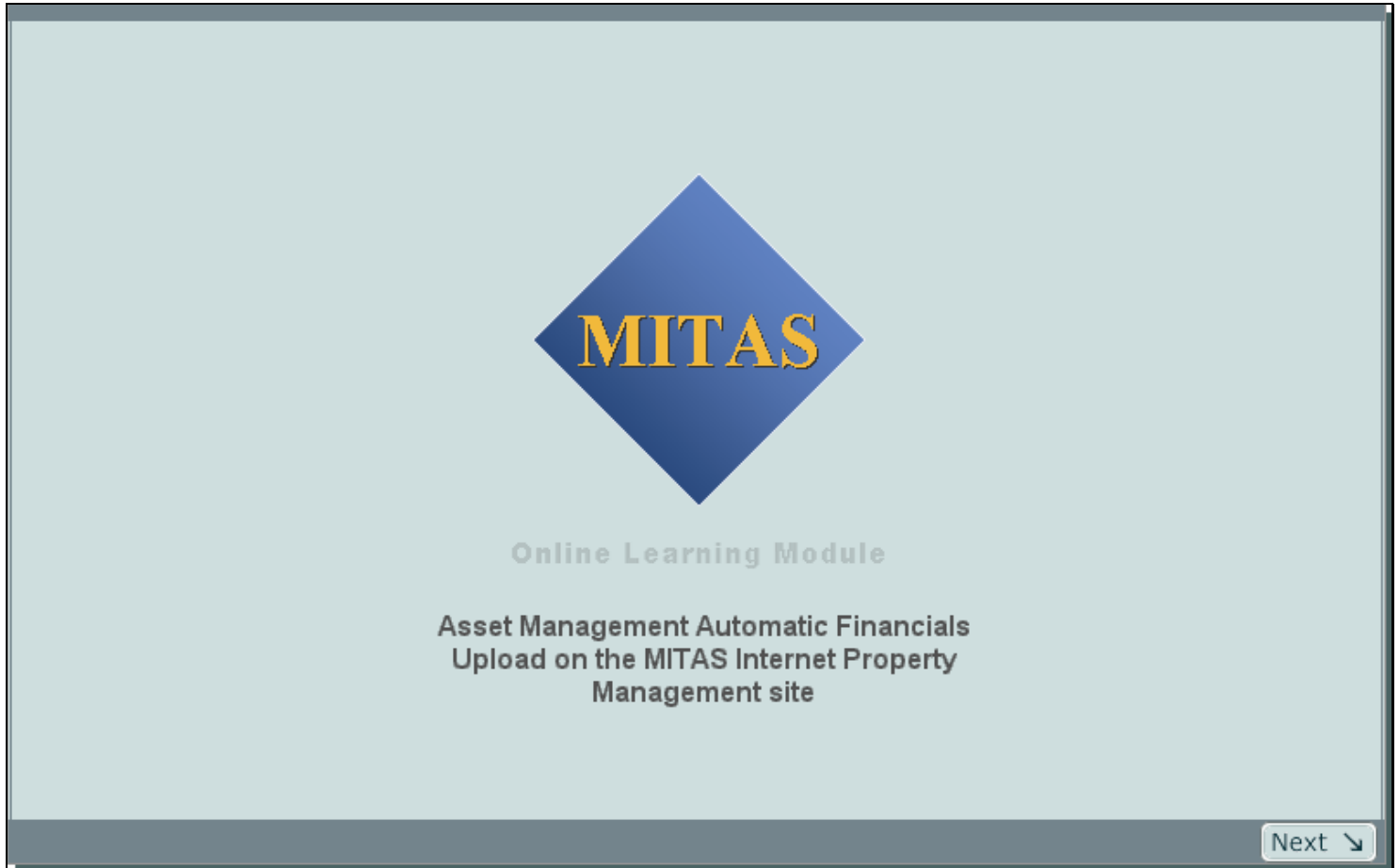**Slide 1 - Title**
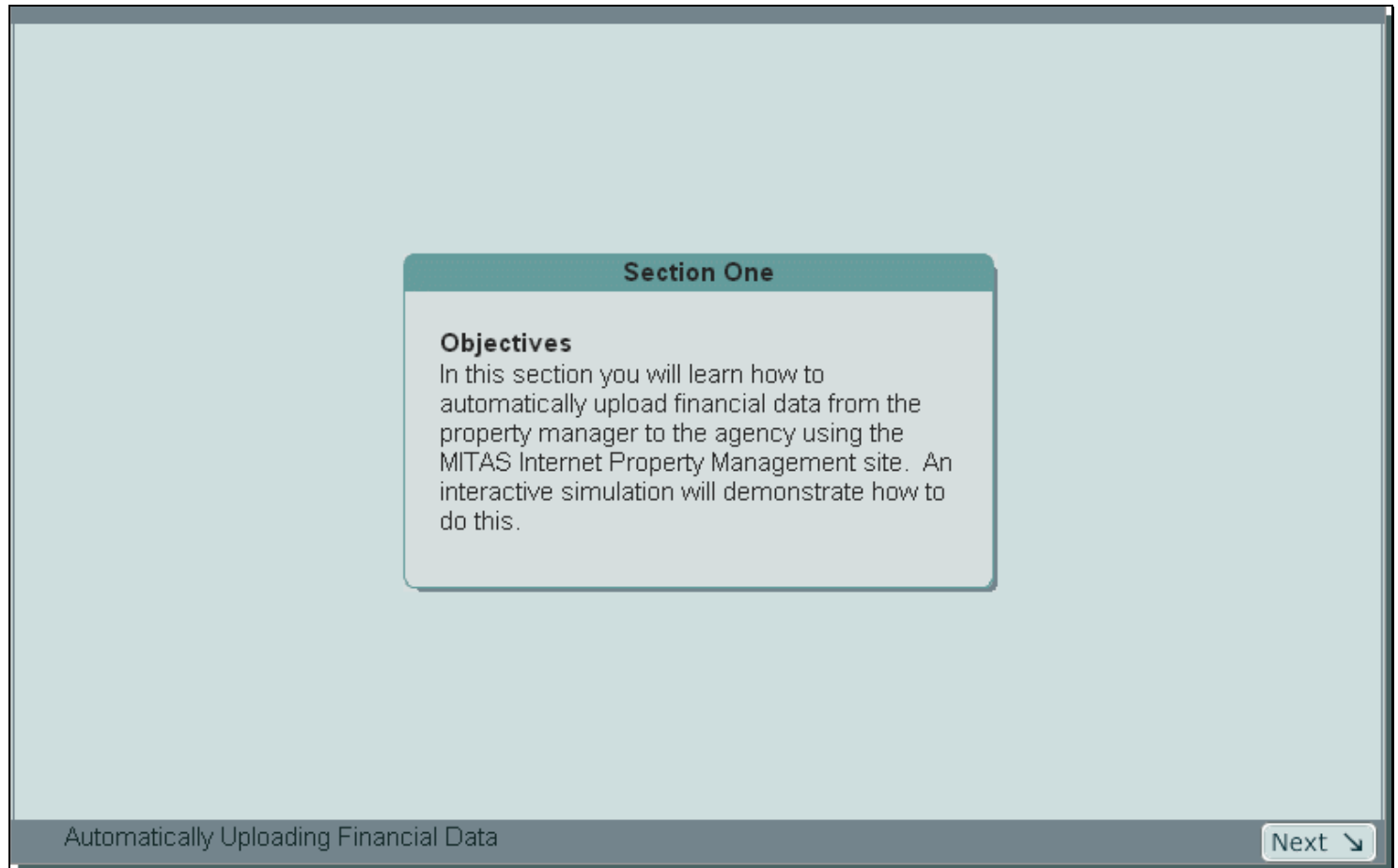

Text Captions

Asset Management Automatic Financials Upload on the MITAS Internet Property Management site

Notes

Slide 2 - Objectives

Text Captions

Section One

Objectives
In this section you will learn how to automatically upload financial data from the property manager to the agency using the MITAS Internet Property Management site. An interactive simulation will demonstrate how to do this.

Automatically Uploading Financial Data
Notes

Slide 3 - Scenario

Text Captions

Scenario

Vicky, a property manager calls you...

"Hi Becky, I'm trying to upload my financial data automatically to the agency using the MITAS Internet Property Management site for the first time. How do I do this?"

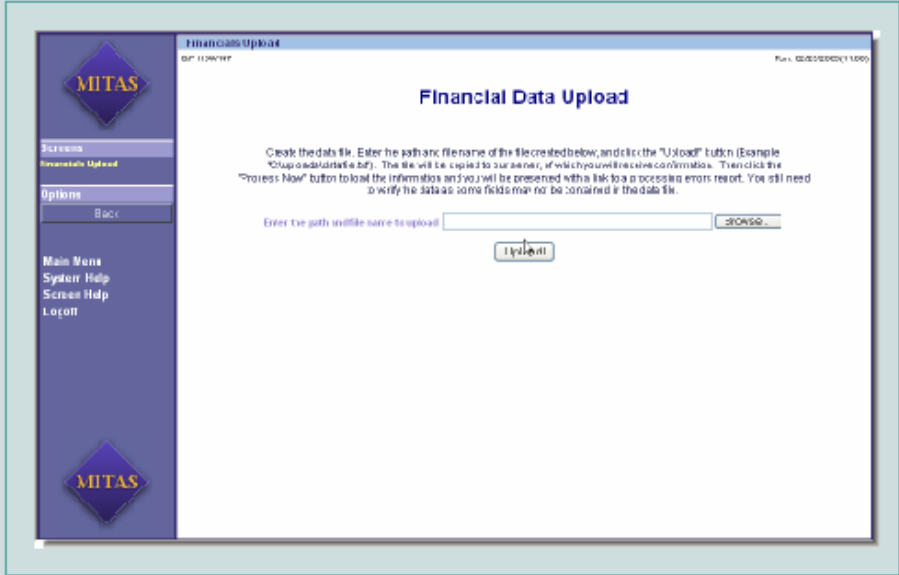Let's find out how we can help Vicky.

Notes

Slide 4 - Concept
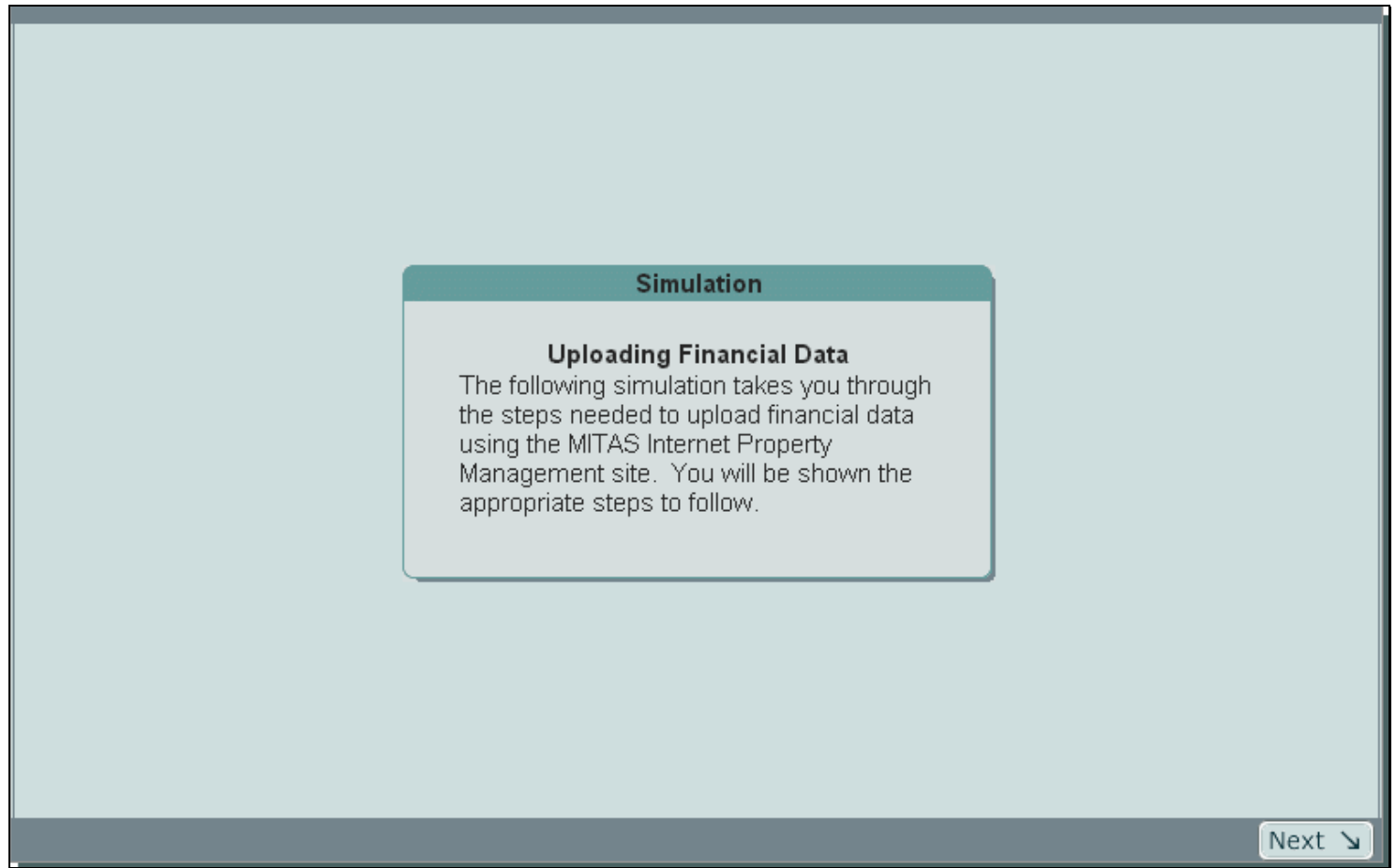

Text Captions

How to Upload Financial Data

It is easy to upload financial data to the agency using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Financials**.

Then you retrieve the property from the **Property / Project** screen. You choose the **Financials Upload** option, and the **Financials Upload** page is displayed. Choose your **Federal ID**, **Fiscal Year**, and **Fiscal Month**. The last step is to input the **Path and File Name** to upload, and press the **Upload** button.

Once your data has been uploaded, you review the financial data and then finalize the data for the agency.

Notes

Slide 5 - Simulation

Text Captions

Simulation

Uploading Financial Data

The following simulation takes you through the steps needed to upload financial data using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.
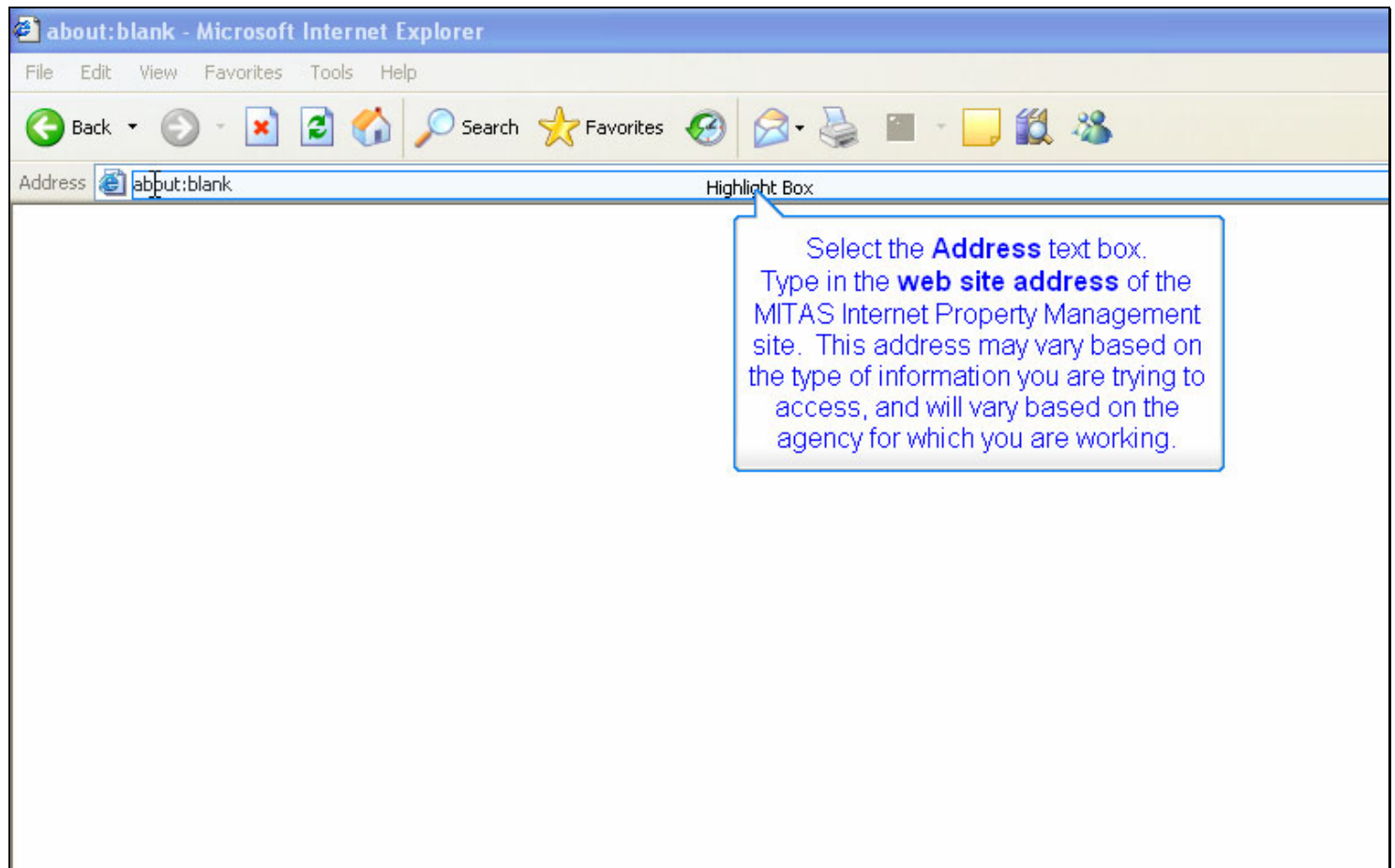
Notes

Slide 6 - Slide 6

Text Captions

Select the **Address** text box.
Type in the **web site address** of the
MITAS Internet Property Management
site. This address may vary based on
the type of information you are trying to
access, and will vary based on the
agency for which you are working.

Notes

Slide 7 - Slide 7

Text Captions

Press **Enter** key

Notes

Slide 9 - Slide 9

Text Captions

The **MITAS Internet Property Management Login** page appears

Select the **Web Profile** box

Notes

Slide 10 - Slide 10

Text Captions

Select the appropriate **Property Manager** item (Property Manager or Property Manager - Financials)

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Financials**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Financials** can view and input data for only financials. Your agency may have established both types of property manager items or only one option may be valid.

Notes

Slide 11 - Slide 11

Address 🅔 http://www.mitas.com/mshda/

Welcome to the MITAS
Internet Property Management Site

MITAS

The **Property Manager Number** is the company or agency number. You cannot view or input data for more t han one company or agency at a time.

Please log in:

Web Profile: Property Manager - Financials

Property Manager Number: Highlight Box

Username:

Password:

Select the **Property Manager Number** text box, and input the appropriate number

Password is

Login

Text Captions

Select the **Property Manager Number** text box, and input the appropriate number

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

Notes

Slide 12 - Slide 12

Text Captions

Select the **Username** text box, and input your username (do not use an administrator username)

Notes

Slide 13 - Slide 13

Text Captions

Select the **Password** text box, and input your password. **Passwords are case sensitive**.

Notes

Slide 14 - Slide 14
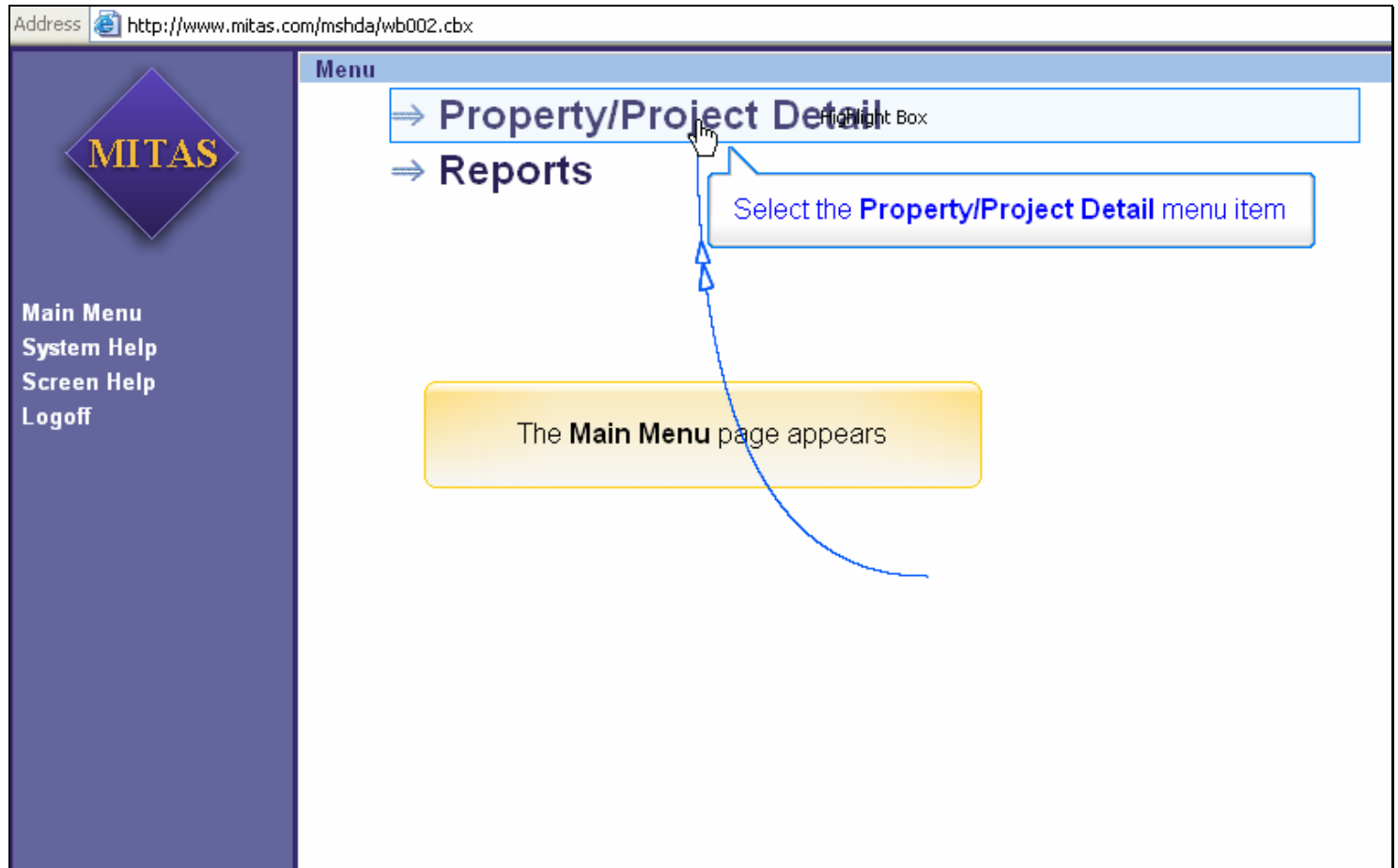

Text Captions

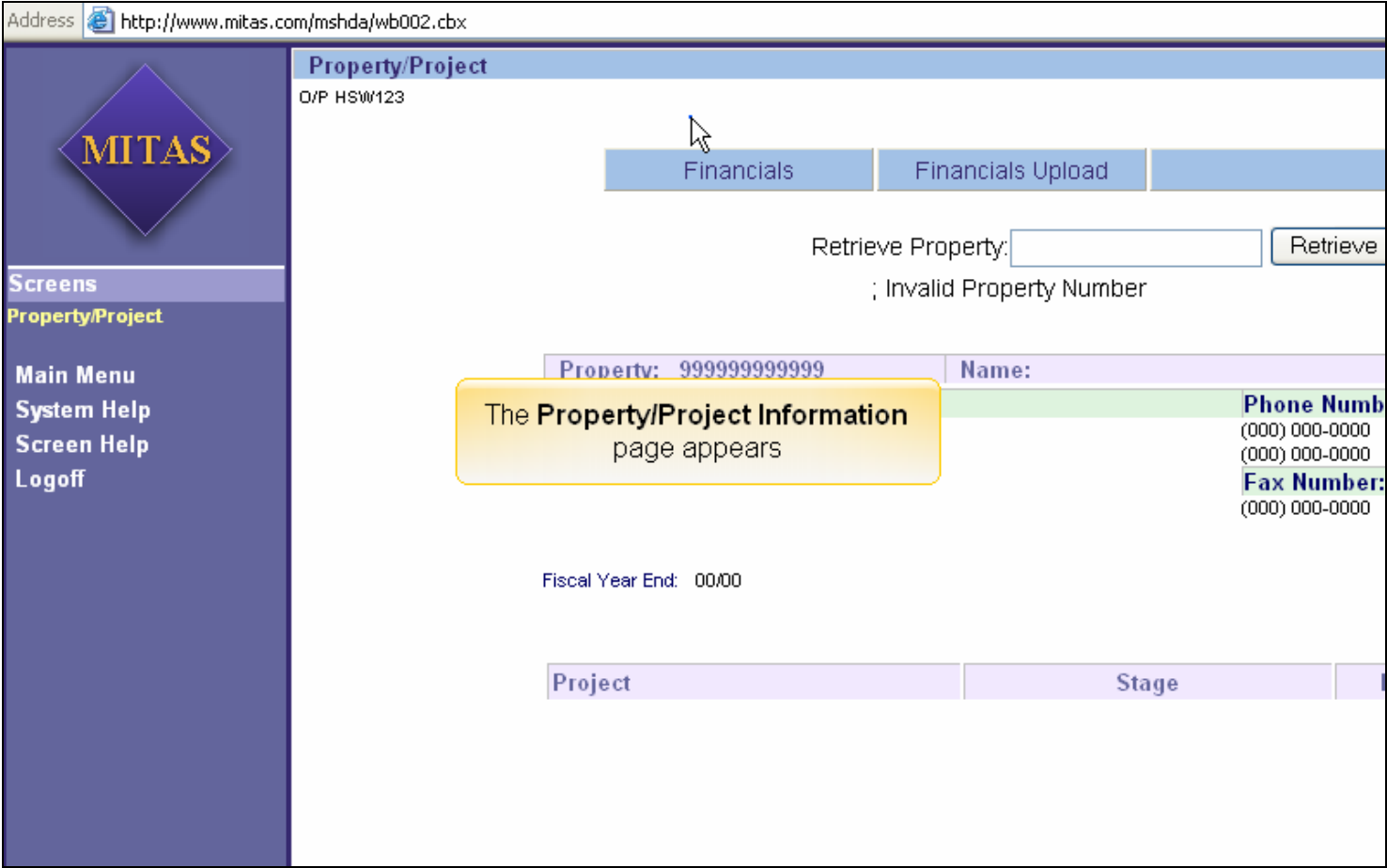Click the **Login** button

Notes

Slide 16 - Slide 16

Text Captions

The **Main Menu** page appears

Select the **Property/Project Detail** menu item

Notes

Slide 18 - Slide 18

Text Captions

The **Property/Project Information** page appears

Notes

Slide 19 - Slide 19

Text Captions

Select the **Retrieve Property** text box, and input the Property Number

For security reasons, you must know the property number for which you are trying to create a transaction

Notes

Slide 20 - Slide 20

Text Captions

Click the **Retrieve** button

Notes

Slide 22 - Slide 22

Text Captions

The **Property/Project Information** page appears with the property data

Verify the property address information is correct. If the information is not correct, contact the agency.

Click the **Financials Upload** button to upload financial data

Notes

Slide 24 - Slide 24

Text Captions

The **Financials Upload** page appears

Select the **Federal ID** combo box

Notes

Slide 25 - Slide 25

Text Captions

Select the **appropriate Federal ID** item

Notes

Slide 26 - Slide 26

Financials Upload

O/P HSW197   Run: 02/25/2005(

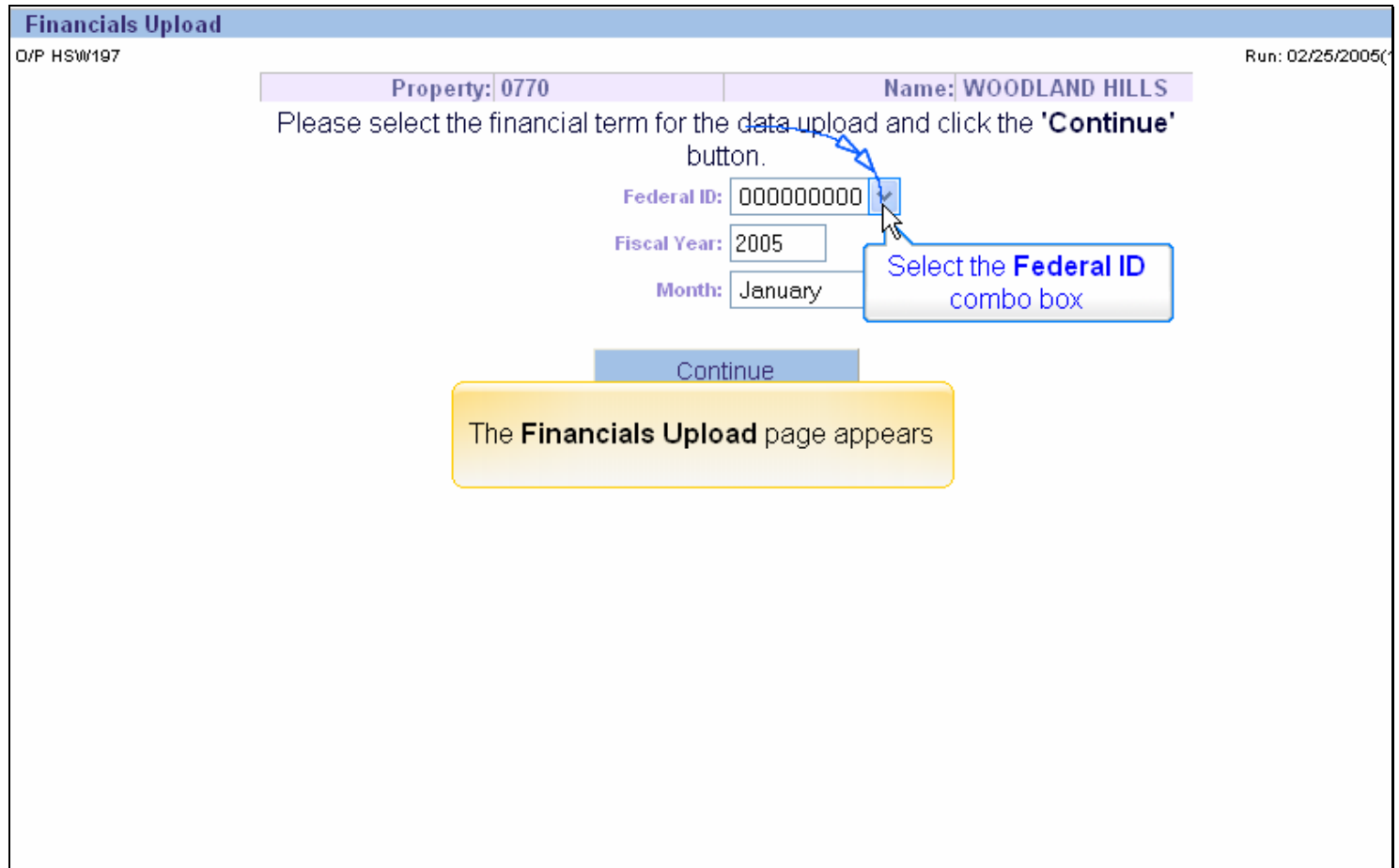Property: 0770   Name: WOODLAND HILLS

Please select the financial term for the data upload and click the **'Continue'** button.

Federal ID: 000000000

Fiscal Year: 2005

Month: J

Select the **Fiscal Year** text box, and input the appropriate fiscal year for which to upload financial data

Contin

Text Captions

Select the **Fiscal Year** text box, and input the appropriate fiscal year for which to upload financial data

Notes

Slide 27 - Slide 27

Text Captions

Select the **Month** combo box

Notes

Slide 28 - Slide 28

Text Captions

Select the **appropriate Month** item

Notes

Slide 29 - Slide 29

Financials Upload

O/P HSW197   Run: 02/25/2005(

Property: 0770	Name: WOODLAND HILLS

Please select the financial term for the data upload and click the **'Continue'** button.

Federal ID: 000000000

Fiscal Year: 2004

Month: September

Continue
Highlight Box

Click the **Continue** button

Text Captions

Click the **Continue** button

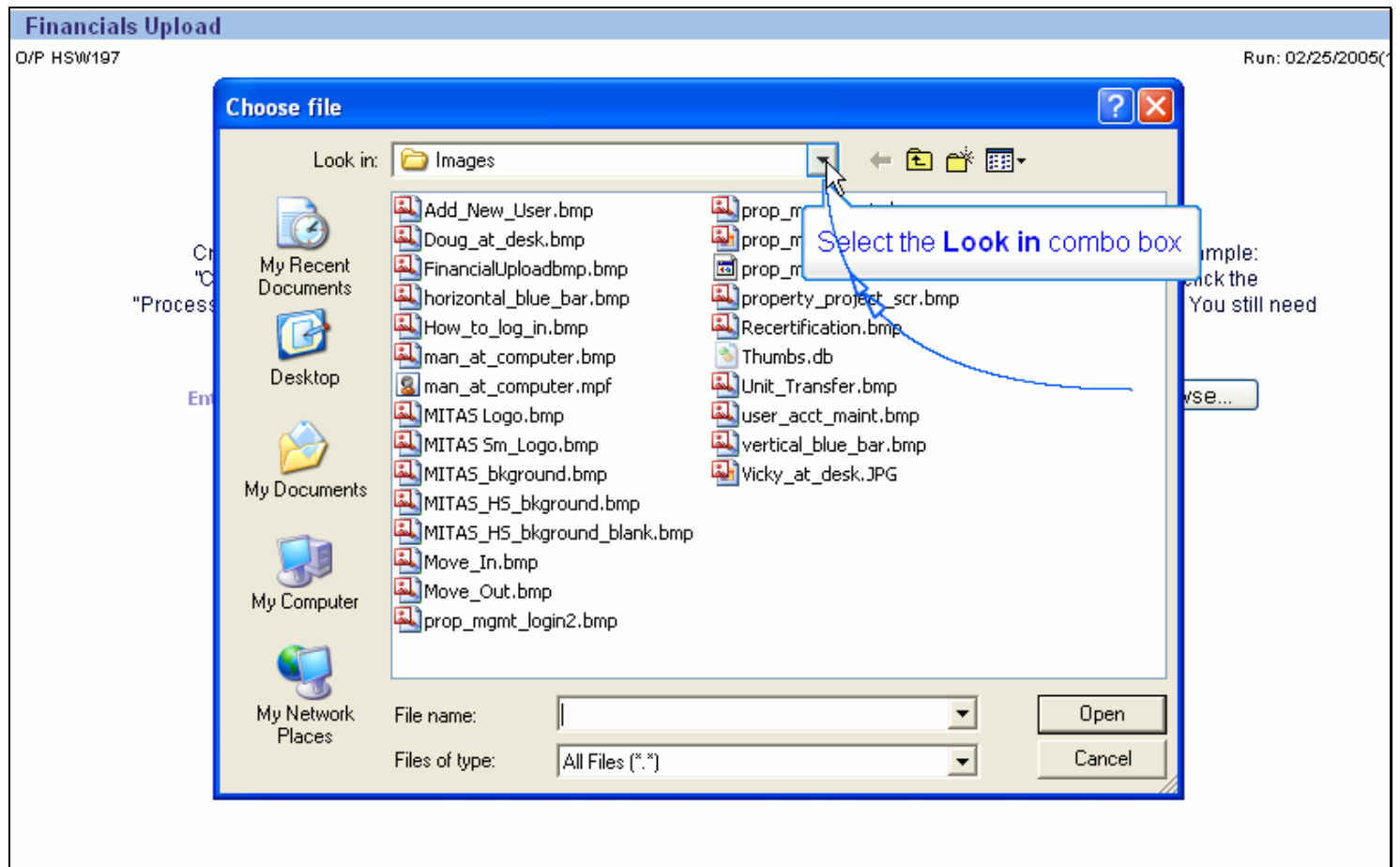**Notes**

Slide 31 - Slide 31

Text Captions

The **Financials Upload** page appears

Select the **Path and File Name to Upload** text box, and input the path and file name of the file containing the financial data. If you do not know the path and file name, click the **Browse** button to search for the file.

The file containing the financial data to be uploaded must be saved as a **CSV** (comma delimited) file type. This is a common file type option available when a saving a file using a spreadsheet.
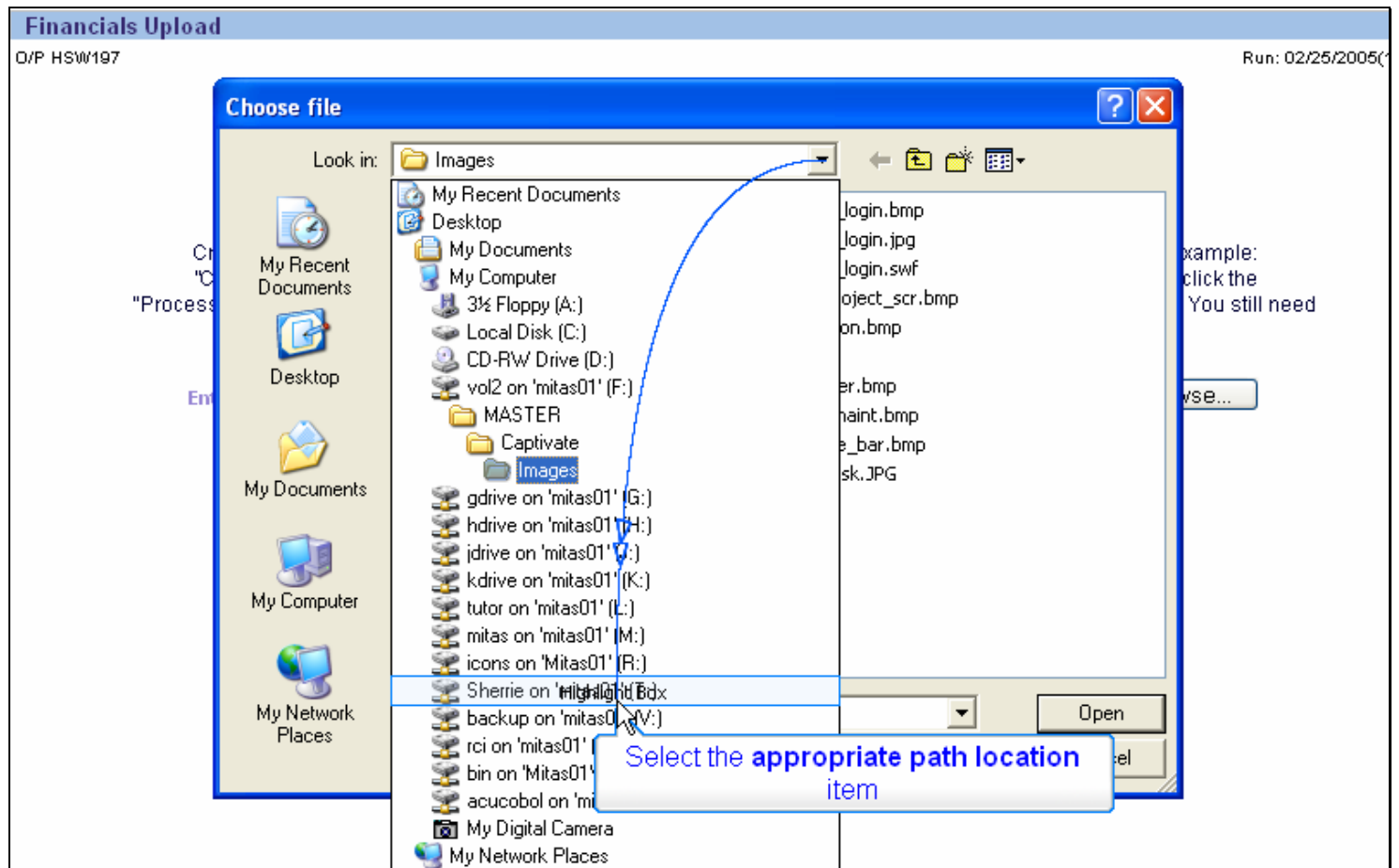
Notes

Slide 32 - Slide 32

Text Captions

Select the **Look in** combo box
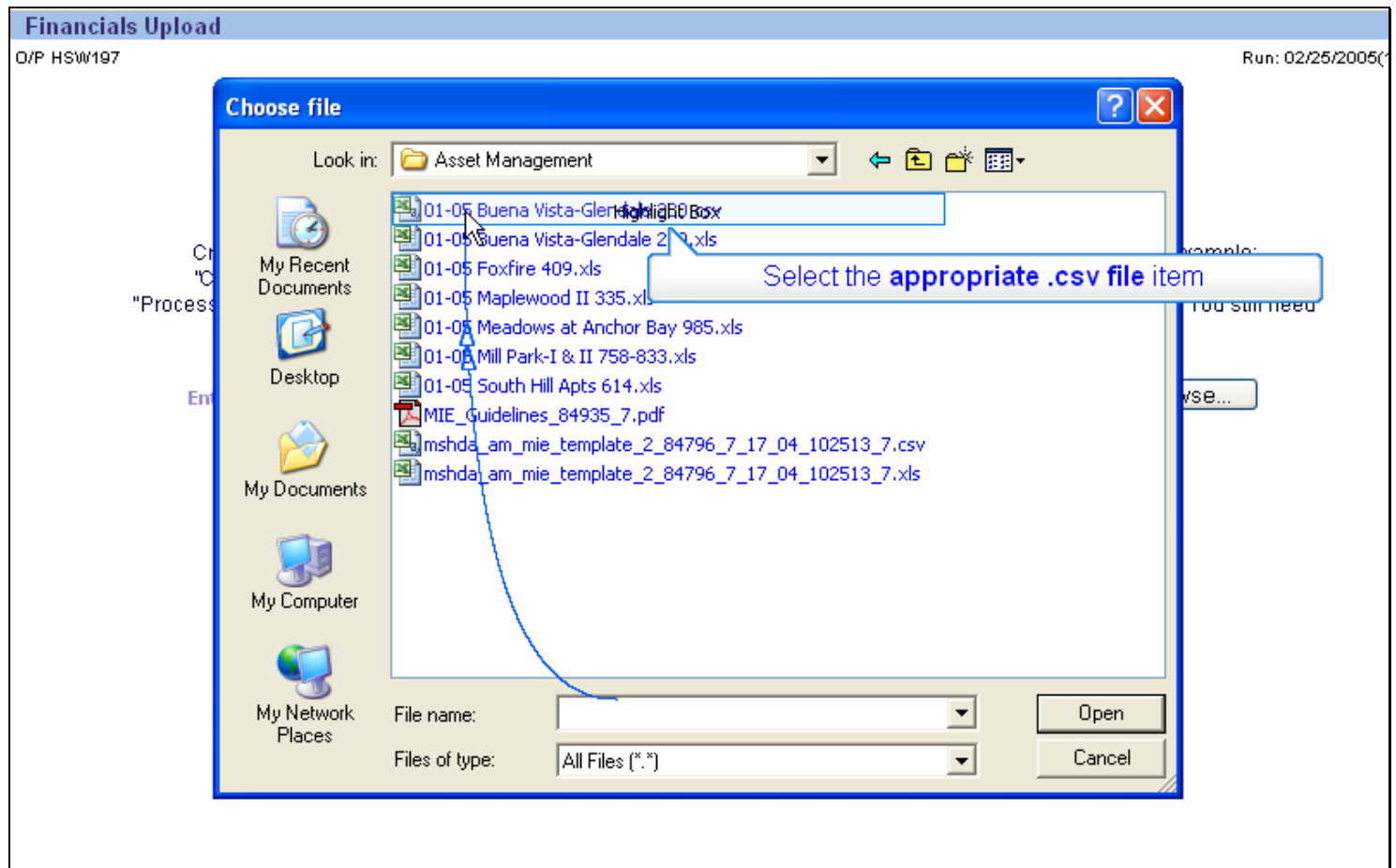
Notes

Slide 33 - Slide 33

Text Captions

Select the **appropriate path location** item

Notes

Slide 34 - Slide 34

Text Captions

Select the **appropriate .csv file** item

Notes

Slide 35 - Slide 35

Text Captions

Click the **Open** button

Notes

Slide 36 - Slide 36

Text Captions

Click the **Upload** button

Notes

Slide 38 - Slide 38

Data Import Interface

File Uploaded Successfully!

You mu~~~~   processed.

The **Data Import Interface** page appears

Highlight Box

Click the **Process Now** button

Text Captions

The **Data Import Interface** page appears

Click the **Process Now** button

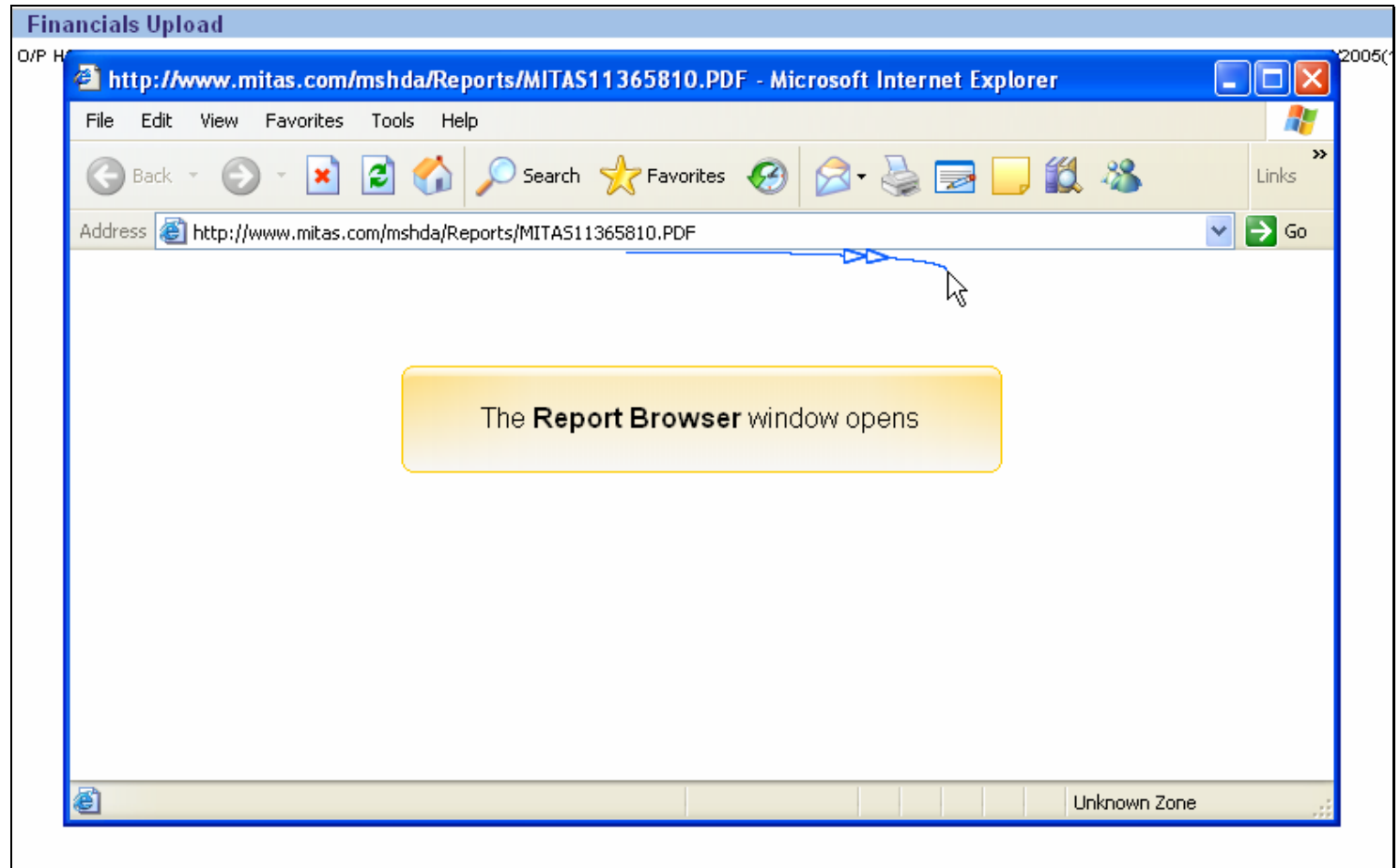**Notes**

Slide 40 - Slide 40

Text Captions

The **Financials Upload Completion** page appears

Select the **this link** link to view the transaction upload error report
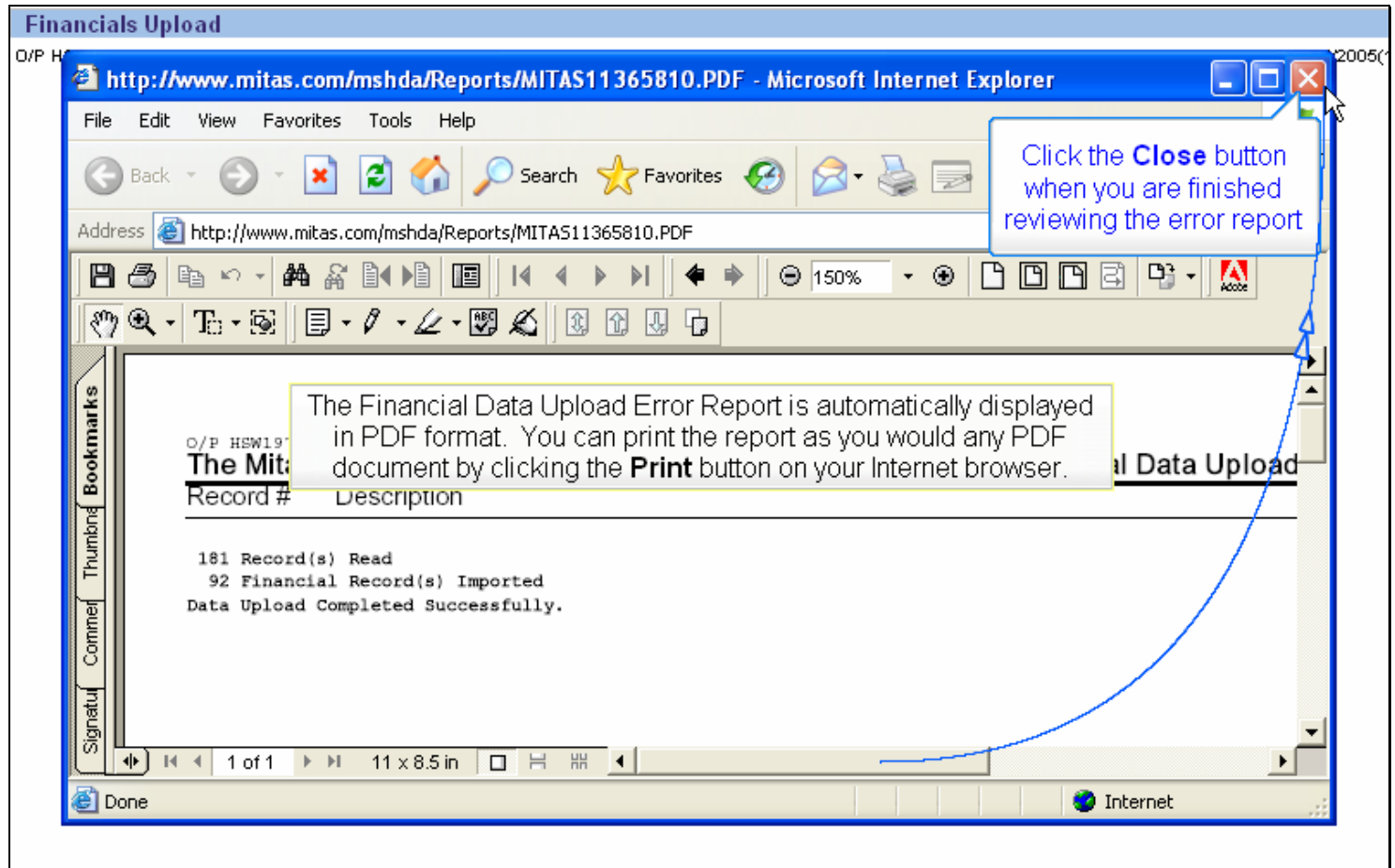
Notes

Slide 42 - Slide 42

Text Captions

The **Report Browser** window opens

Notes

Slide 44 - Slide 44

Text Captions

Click the **Close** button when you are finished reviewing the error report

The **Financial Data Upload** report is displayed

The Financial Data Upload Error Report is automatically displayed in PDF format. You can print the report as you would any PDF document by clicking the **Print** button on your Internet browser.

Notes

Slide 45 - Slide 45

Financials Upload

O/P HSW197   Run: 02/25/2005(

Please click **this link** to review the transaction upload errors, click the "Back" button or the
"MainMenu" button when done.

> The **Financials Upload Completion**
> page appears

Text Captions

The **Financials Upload Completion** page appears
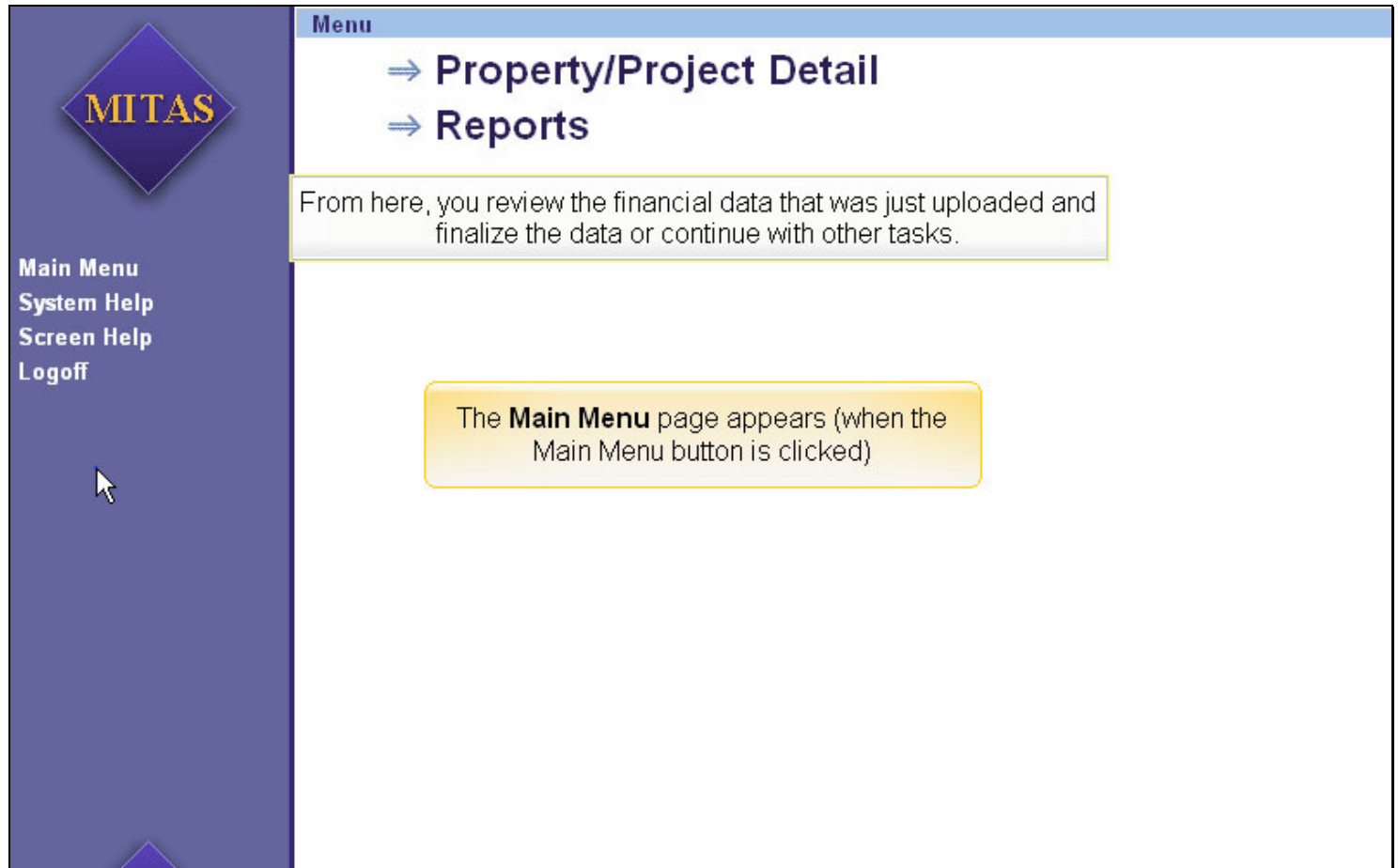
Notes

Slide 46 - Slide 46

Text Captions

Click the **Back** button or **Main Menu** button when you finished

Notes

Slide 48 - Slide 48

Text Captions

The **Main Menu** page appears (when the Main Menu button is clicked)

From here, you review the financial data that was just uploaded and finalize the data or continue with other tasks.

Notes

Slide 49 - End

Text Captions

Congratulations!
You have completed Asset Management Automatic Financials Upload on the MITAS Internet Property Management site.

Notes